

FORM LM-30

LABOR ORGANIZATION OFFICER AND EMPLOYEE REPORT

This report is mandatory under P.L. 86-257, as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C 439 or 440.



READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

1. File Number U - <u>4592</u>	2. Fiscal Year Covered From: <u>1</u> / <u>1</u> / <u>2004</u> Through: <u>12</u> / <u>31</u> / <u>2004</u>
3. Name and address of person filing. Name <u>ROBERT A Rudy</u> P.O. Box, Bldg., Room No., if any _____ Street <u>1406 KINGPORT DR</u> City <u>SPLENDORA</u> State <u>TX</u> ZIP Code + 4 <u>77372</u>	4. Name, file number, and address of labor organization. Name <u>International Association of Ironworkers # 84</u> Labor Organization File Number <u>015757</u> P.O. Box, Building and Room Number, if any _____ Street <u>7400 Dahlia</u> City <u>Houston</u> State <u>Texas</u> ZIP Code + 4 <u>77012</u>
5. Position in labor organization. <u>BUSINESS AGENT / ORGANIZER</u>	

Enter appropriate data below if, during the past fiscal year, you or your spouse or minor child directly or indirectly had any of the following interests (except as specified in the exclusions set forth in the instructions):

A. Held an interest in, engaged in transactions (including loans) with, or derived income or other economic benefit of monetary value from an employer whose employees your organization represents or is actively seeking to represent.	
6. Name and address of Employer (including trade name, if any). Name _____ Trade Name, if any: _____ P.O. Box, Bldg., Room No., if any _____ Street _____ City _____ State _____ ZIP Code + 4 _____	7.a. Nature of Interest, Transaction, or Income. _____ 7.b. Amount. _____

Signature

15. Signature and verification. The undersigned declares, under penalty of Perjury and other applicable penalties of the law, that all of the information submitted in this report (including the information contained in any accompanying documents), has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See the section on penalties in the instructions.)		
Signed <u>Robert A. Rudy</u>	On <u>7-28-05</u> Date	<u>713-928-3361</u> Telephone Number

Name of Person Filing <i>Robert A. Rudy</i>	File Number U-
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Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any). Name <u>Zenith Administrators Inc</u> Trade Name, if any: <u></u> P.O. Box, Bldg., Room No., if any <u>Suite 2600</u> Street <u>541 N. Fairbanks Ct.</u> City <u>Chicago</u> State <u>Illinois</u> ZIP Code + 4 <u>60611</u>	9. Business deals with: <input type="checkbox"/> a. Labor Organization <input checked="" type="checkbox"/> b. Trust <input type="checkbox"/> c. Employer				
10. If 9.b. or 9.c. is checked give trust or employer's name. Name <u>Texas Ironworkers' Funds</u> Trade Name, if any: <u></u> P.O. Box, Bldg., Room No., if any <u>P.O. 721798</u> Street <u></u> City <u>Houston</u> State <u>Texas</u> ZIP Code + 4 <u>77272-1798</u>	<table border="1"><tr><td data-bbox="812 714 1537 1060">11.a. Nature of such dealing. <u>Trust Fund Administrators</u></td></tr><tr><td data-bbox="812 1060 1537 1113">11.b. Approximate dollar value of such dealing. <u>\$945,074</u></td></tr><tr><td data-bbox="812 1113 1537 1449">12.a. Nature of interest held or income received. <u>Entertainment 10-17-2004</u></td></tr><tr><td data-bbox="812 1449 1537 1499">12.b. Amount. <u>\$11</u></td></tr></table>	11.a. Nature of such dealing. <u>Trust Fund Administrators</u>	11.b. Approximate dollar value of such dealing. <u>\$945,074</u>	12.a. Nature of interest held or income received. <u>Entertainment 10-17-2004</u>	12.b. Amount. <u>\$11</u>
11.a. Nature of such dealing. <u>Trust Fund Administrators</u>					
11.b. Approximate dollar value of such dealing. <u>\$945,074</u>					
12.a. Nature of interest held or income received. <u>Entertainment 10-17-2004</u>					
12.b. Amount. <u>\$11</u>					

Name of Person Filing

Robert A. Lusk

File Number U-

Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Capital Institutional Services IncTrade Name, if any: P.O. Box, Bldg., Room No., if any Suite 2200Street 750 North St. Paul St.City DallasState Texas ZIP Code + 4 75201

9. Business deals with:

☐ a. Labor Organization☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Texas Ironworkers' FundsTrade Name, if any: P.O. Box, Bldg., Room No., if any P.O. 721798Street City HoustonState Texas ZIP Code + 4 77272-1798

11.a. Nature of such dealing.

Commision Recapture Program

11.b. Approximate dollar value of such dealing.

\$116,237

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11

Name of Person Filing

Robert A. Rudy

File Number U-

Part 2 Continuation Page

8. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Union Labor Life Insurance Co.

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 111 Massachusetts Ave N.W.

City Washington

State District of Columbia ZIP Code + 4 20001-1461

9. Business deals with:

a. Labor Organization

☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Texas Ironworkers' Funds

Trade Name, if any:

P.O. Box, Bldg., Room No., if any P.O. 721798

Street

City Houston

State Texas ZIP Code + 4 77272-1798

11.a. Nature of such dealing.

Insurance Health & Liability

11.b. Approximate dollar value of such dealing.

\$1,692,942

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11

Name of Person Filing <u>Robert A. Rudy</u>	File Number U-
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Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any). Name <u>Consulting Service Group</u> Trade Name, if any: _____ P.O. Box, Bldg., Room No., if any _____ Street <u>6075 Poplar Ave</u> City <u>Memphis</u> State <u>Tennessee</u> ZIP Code + 4 <u>38119</u>	9. Business deals with: <div style="margin-left: 20px;"> <input type="checkbox"/> a. Labor Organization <input checked="" type="checkbox"/> b. Trust <input type="checkbox"/> c. Employer </div>				
10. If 9.b. or 9.c. is checked give trust or employer's name. Name <u>Texas Ironworkers' Funds</u> Trade Name, if any: _____ P.O. Box, Bldg., Room No., if any <u>P.O. 721798</u> Street _____ City <u>Houston</u> State <u>Texas</u> ZIP Code + 4 <u>77272-1798</u>	11.a. Nature of such dealing. <u>Consulting</u> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%; padding: 5px;">11.b. Approximate dollar value of such dealing.</td> <td style="width: 30%; padding: 5px; text-align: right;"><u>\$87,500</u></td> </tr> </table> 12.a. Nature of interest held or income received. <u>Entertainment 10-17-2004</u> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%; padding: 5px;">12.b. Amount.</td> <td style="width: 30%; padding: 5px; text-align: right;"><u>\$11</u></td> </tr> </table>	11.b. Approximate dollar value of such dealing.	<u>\$87,500</u>	12.b. Amount.	<u>\$11</u>
11.b. Approximate dollar value of such dealing.	<u>\$87,500</u>				
12.b. Amount.	<u>\$11</u>				

Name of Person Filing

Robert A. Rudy

File Number U-

Part B Continuation Page

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8. Name and address of Business (including trade name, if any).

Name Austin, Calvert, Flavin, Inc.

Trade Name, if any: _____

P.O. Box, Bldg., Room No., if any Suite 400Street 755 East MulberryCity San AntonioState TexasZIP Code + 4 78212

9. Business deals with:

a. Labor Organization

☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Texas Ironworkers' Funds

Trade Name, if any: _____

P.O. Box, Bldg., Room No., if any P.O. 721798

Street _____

City HoustonState TexasZIP Code + 4 77272-1798

11.a. Nature of such dealing.

Investment Managers

11.b. Approximate dollar value of such dealing.

\$108,343

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11

Name of Person Filing

Robert A Rudy

File Number U-

Part B Continuation Page

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8. Name and address of Business (including trade name, if any).

Name Davis & SelwynTrade Name, if any: Douglas M. Selwyn P.C.P.O. Box, Bldg., Room No., if any Suite 4050Street 1600 Smith StreetCity HoustonState Texas ZIP Code + 4 77002

9. Business deals with:

☐ a. Labor Organization☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Texas Ironworkers' Funds

Trade Name, if any:

P.O. Box, Bldg., Room No., if any P.O. 721798

Street

City HoustonState Texas ZIP Code + 4 77272-1798

11.a. Nature of such dealing.

Fund Council

11.b. Approximate dollar value of such dealing.

\$237,641

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11

Name of Person Filing <i>Robert A. Rudy</i>	File Number U-
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Part B Continuation Page

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8. Name and address of Business (including trade name, if any). Name <u>The Segal Company</u> Trade Name, if any: _____ P.O. Box, Bldg., Room No., if any <u>P.O. Box 4075</u> Street <u>Church Street Station</u> City <u>New York</u> State <u>New York</u> ZIP Code + 4 <u>10261-4075</u>	9. Business deals with: <input type="checkbox"/> a. Labor Organization <input checked="" type="checkbox"/> b. Trust <input type="checkbox"/> c. Employer
10. If 9.b. or 9.c. is checked give trust or employer's name. Name <u>Texas Ironworkers' Funds</u> Trade Name, if any: _____ P.O. Box, Bldg., Room No., if any <u>P.O. 721798</u> Street _____ City <u>Houston</u> State <u>Texas</u> ZIP Code + 4 <u>77272-1798</u>	11.a. Nature of such dealing. <u>Benefit Counsultant</u> 11.b. Approximate dollar value of such dealing. <u>\$154,844</u> 12.a. Nature of interest held or income received. <u>Entertainment 10-17-2004</u> 12.b. Amount. <u>\$11</u>

Name of Person Filing

Robert A. Rudy

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Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name **Davis Hamilton Jackson**

Trade Name, if any:

P.O. Box, Bldg., Room No., if any **Suite 1600**Street **1401 McKinney**City **Houston**State **Texas**ZIP Code + 4 **77010-0435**

9. Business deals with:

a. Labor Organization

☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name **Texas Ironworkers' Funds**

Trade Name, if any:

P.O. Box, Bldg., Room No., if any **P.O. 721798**

Street

City **Houston**State **Texas**ZIP Code + 4 **77272-1798**

11.a. Nature of such dealing.

Investment Managers

11.b. Approximate dollar value of such dealing.

\$117,235

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11

Name of Person Filing

Robert A. Rudy

File Number U-

Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Bank One

Trade Name, if any:

P.O. Box, Bldg., Room No., if any P.O. Box 710812

Street

City ColumbusState OhioZIP Code + 4 43271

9. Business deals with:

a. Labor Organization

☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Texas Ironworkers' Funds

Trade Name, if any:

P.O. Box, Bldg., Room No., if any P.O. 721798

Street

City HoustonState TexasZIP Code + 4 77272-1798

11.a. Nature of such dealing.

Investment management services Fee Department

11.b. Approximate dollar value of such dealing.

\$128,570

12.a. Nature of interest held or income received.

Entertainment 10-17-2005

12.b. Amount.

\$11

Name of Person Filing

Robert A. Rudy

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Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Barrow, Hanley, Mewhinny, & Strauss IncTrade Name, if any: P.O. Box, Bldg., Room No., if any 31st floorStreet 2200 Ross AvenueCity DallasState TexasZIP Code + 4 75201

9. Business deals with:

a. Labor Organization

☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Texas Ironworkers' FundsTrade Name, if any: P.O. Box, Bldg., Room No., if any P.O. 721798Street City HoustonState TexasZIP Code + 4 77272-1798

11.a. Nature of such dealing.

Investment Managers

11.b. Approximate dollar value of such dealing.

\$630,553

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11

Name of Person Filing

Robert A. Rudy

File Number U-

Part 5 Continuation Page

8. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Vahldiek, Cano, & Petroski

Trade Name, if any:

P.O. Box, Bldg., Room No., if any Suite 4050Street 1600 Smith StreetCity HoustonState TexasZIP Code + 4 77002

9. Business deals with:

☒ a. Labor Organization

b. Trust

c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street

City

State

ZIP Code + 4

11.a. Nature of such dealing.

District Council of Texas General Council

11.b. Approximate dollar value of such dealing.

\$0

12.a. Nature of interest held or income received.

Entertainment 10-17-2004

12.b. Amount.

\$11